# Incident Procurement Database User Guide

**IPD_V1**

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**&**

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# Contents

IPD V1                               2016 Update                          02/17/2016

**Introduction**

This database was developed to track purchases as well as agreements made for any type of incident, much like the original Buying Team Spreadsheets. The reason to move towards a database, is to streamline the information gathered while procuring equipment, services, and supplies for tracking cost as well as following trends in purchases. This user guide will go over the setup, input, and closeout of the database by incident.

The database is set up to follow the logical progression of tracking buying team members, recording the incident host unit, followed by the orders placed.  The user information entered into the system will automatically update a series of canned reports which can be printed or e-mailed to the appropriate receiver. It is recommended to look at reports as data is entered to see how your information will be displayed.

Buttons have been created as either hot links or basic execution functions.  All have been labeled for their actual use.

This database was field tested during the summer of 2015 and revisions were made based on feedback from the field. Overall the database was successfully deployed on a total of 53 incidents across 9 dispatch centers in Region 6.
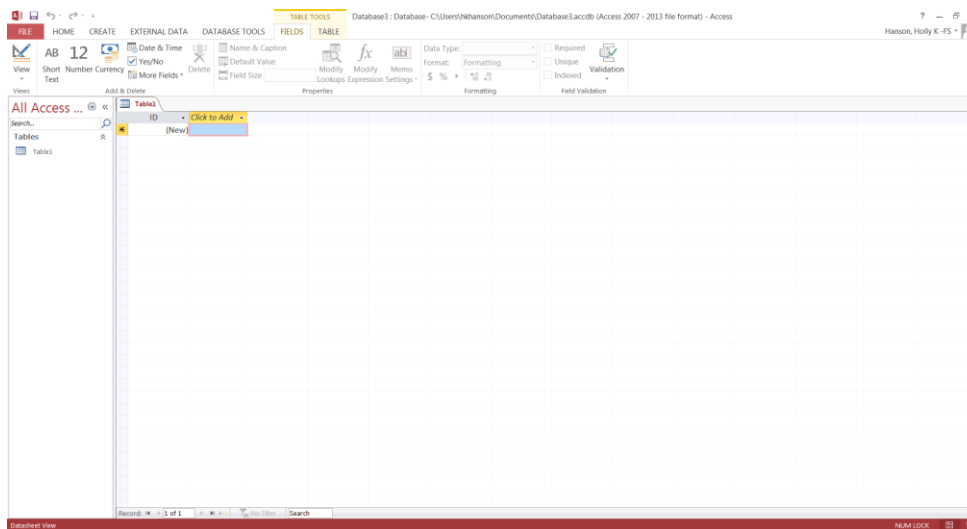
If at any time, this database is too cumbersome or becomes corrupt the user shall have to default back to the National Buying Team spreadsheets.

## Setup
1. Launch the Microsoft ACCESS Program
2. Double click and open a Blank desktop database
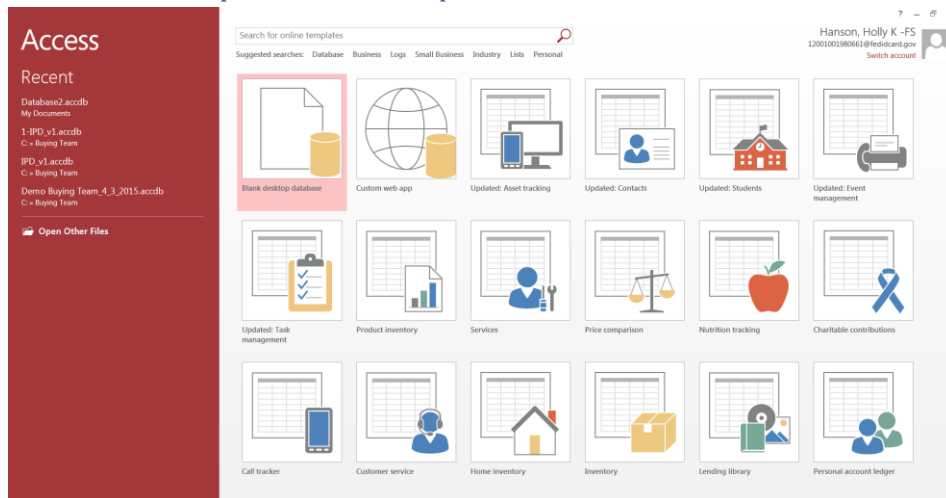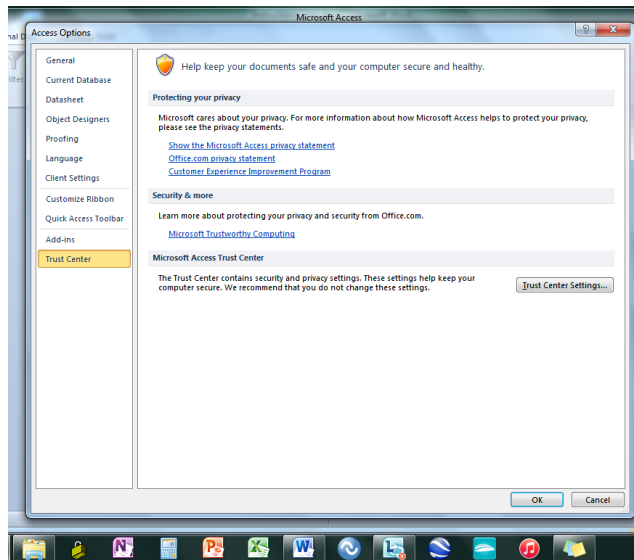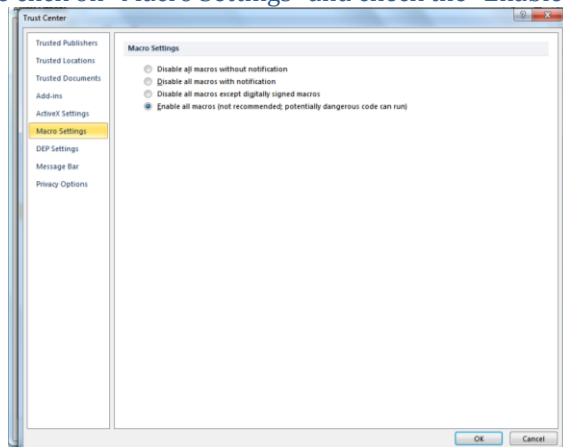


3. Click on File and then Options



4.

> **Commented [HHK-1]:** Delete-Old

4. Then click on "Trust Center" and click "Trust Center Settings" radio button.



5. Then click on the click on "Macro Settings" and check the "Enable all Macros"



6. Click the "OK" radio button and you are done with the set up.
7. Create a folder on your "C" drive and name it "Buying Team"

8. Download the database from
   http://www.fs.usda.gov/detail/r6/workingtogether/contracting/?cid=stelprdb5356405
9. Right Click on the "NEW Buying Team Database" and then select "Save Target as…."
10.    Select the "C:/Buying Team" Folder and make sure you rename the database to "IPD_v1.accdb". Then save.
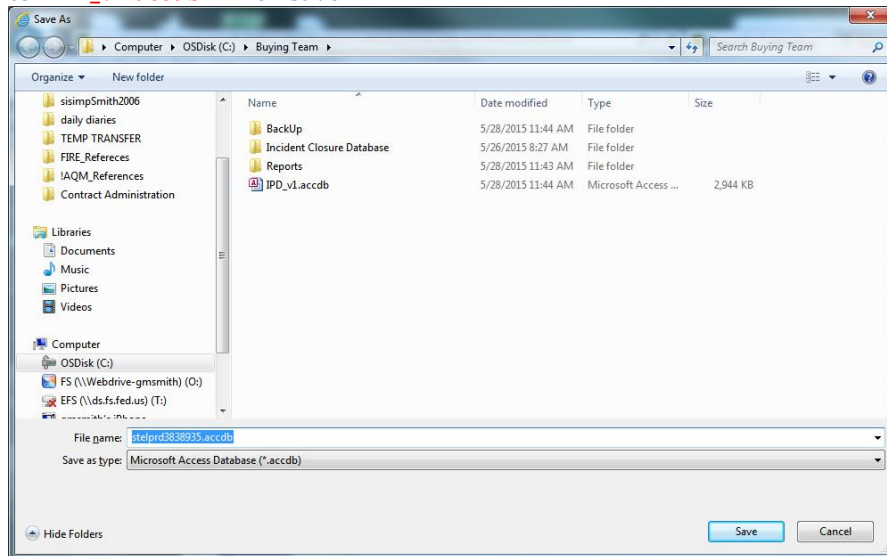


11.    Now open the Buying Team Database and the user should see this main screen.
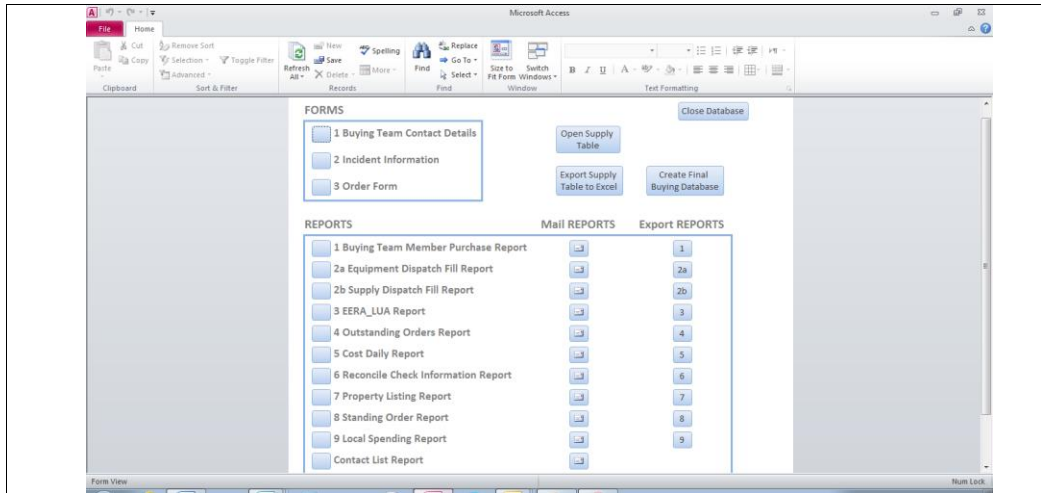
## Input

From the main screen, under Forms, start with #1-Buying Team Contact Details. Then Move onto #2-Incident Information, followed by #3-Order Form. The flow of data information in every from is from top to bottom left to right. The information gathered should follow this logical progression. Bold text indicates a drop down field.

## Definitions by Form

### #1- Buying Team Contact Form

This form will be used every time there is a new Buying Team Member/Leader added to the Incident. It is important to fill this form out in its entirety.

This form can be used to:

- -track down who made purchases, ie by looking at the last 4 digits of the credit card
- -help us forward information to the appropriate member once they have left the assignment
- -help the Buying Team Leader assign workload based on the Card Limit of the team member
- -contact the home unit in case there is an emergency while on assignment

## Contact Details

**Contact Details**

| Save & New | Delete Record | Save & Close |

Team Member Initials: GMS    Last 4 CC: 4236    Card Limit: 500K ▼

First Name: Gavin
Last Name: Smith *

Job Title: Contract Specialist - BUYM
Company: USFS R6

E-mail: gmsmith@fs.fed.us
Buying Team Name: ▼

Business Phone: 541-278-3844
Fax: 541-278-3844

Home Phone: 541-676-8707
Mobile Phone: 541-771-3119
Mobile Phone

Address: 72510 Coyote Rd

City: Pendleton    State/Province: OR    ZIP/Postal Code: 97801    Country/Region:

Notes: $1,000,000 warrant for Task Orders, $150,000 for contracts, Purchase Card & Checks

Record: 1 of 4    No Filter    Search

| Team Member Initials | First initials of the team member's name |
|---|---|
| Last 4 CC | Last four |
| Card Limit | Single Purchase limit |
| First Name | As shown on the purchase card |
| Last Name* (mandatory) | As shown on the purchase card |
| Job Title | Local title as well as IQCS position on the incident |
| Company | Where the member typically works |
| e-mail | Main contact e-mail address after the incident is closed |
| *Buying Team Name* | Check with your team leader (editable drop down) |
| Business Phone | Work phone number |
| Fax | Work Fax number |
| Home Phone | Personal home phone for emergency contact |
| Mobile Phone | Best phone number to contact the team member on the incident |
| Address | Physical duty station address |
| City | Duty Station City |
| State/ Province | Duty Station state |
| Zip/ Postal Code | Duty Station ZIP Code |
| Country/ Region | Duty Station Country (if applicable) |

| Notes | Field to capture critical team member information not listed above |
|---|---|
| **Attachments** | On the main form where you see the "Adobe PDF" icon in the screenshot above you can double click in that area and add attachments to the buying team member's profile.<br><br>This is a great spot to upload a copy of the members Warrant if applicable |

## #2-Input Incident Form

Every time there is a new Incident you must insert it into this form.  You maybe we working several incidents at a time and each of them can be tracked on the one Database.  A new incident name is input when a new incident number is created.



| Incident Name | Name on the Resource Order |
|---|---|
| Incident Number | Number of the Resource Order |
| Dispatch Center | Short Code (ex. BMIDC) center ID used by buying team for the named incident |
| Dispatch Phone | Main call in line |
| Dispatch Fax | Main FAX at the dispatch center |
| Host Unit Name | Where the incident is located |
| **Responsible Pay Agency** | **Agency who will be the responsible paying unit (editable drop down)** |

| Host Address, City, State, Zip Code | Address where documentation box will reside |
|---|---|
| Contact Phone | Primary point of contact ,phone number to call at Host unit |
| Contact Fax | Primary point of contact , fax number to send information to home unit |
| Job Code | String of numbers and letters needed for card reconciliation |
| Override | String of numbers associated with the agency location for card reconciliation |
| Comments | Field to capture critical team member information not listed above |
| *Attachments* | *On the form where you see the "Attachments" in the screenshot above you can double click in that area and add attachments like phone lists maps, etc.* |
| Buttons at the bottom Forest Service, BLM, Park Service, BIA | External web sites to gather addresses, contacts, or local information. |

## #3-Order Form

This is the main tracking form that is used for all of the database entries for Supplies, Services, EERAs, etc.

- This form allows the user to track and comment on purchases by each team member
- Agreements or other pertinent information can be attached in this form and will stay with that unique record. This helps dispatchers and local units find critical agreement information.



| Incident Information (Pick) | Responsible paying code identified by Dispatch fire number |
|---|---|
| Team Member (Pick) | Member who the Resource Order is assigned to |
| *Incident Name* | *Name of incident user can add other names as needed (once entered it is not editable in the drop down) call customer support to fix* |
| **DISPATCH SECTION** | |
| Estimated Quantity | Block 12 Quantity requested on the Resource Order |
| RO Date | Block 12 first Date in this section on the Resource Order |

| Agreement Type | Four options from pick list (default is Supply) |
|---|---|
| Resource Order | Block 12 List the entire number and carry it out 4 digits including the "Alpha" |
| Equipment Supply | General Listing of Major Incident Support Components (Appendix Below) |
| Make/ Model/ Color | 255 character description of purchase (be descriptive it will show on future reports) |
| **RESOURCE ORDER DATES & UNIQUE PURCHASE INFORMATION** | |
| BUYL Rec Date | Date the team leader received the requisition |
| Order Fill Date | Date the purchase was actually made |
| Posted Date | Date the waybill is received from the receiving unit |
| Property | Radio button if "checked" this purchase will show on Report #7 |
| Return Date | Date the property was returned to the receiving Unit |
| **PURCHSE/ VENDOR INFORMATION** | |
| Vendor Name | Name of store or vendor (once entered it is not editable in the drop down) |
| Vendor Address | Business address or Physical Location (this is editable and searchable) |
| City | City of Purchase |
| State | State of Purchase two letter abbreviation |
| Zip Code | Five Digit Code |
| Vendor Contact | Open field for phone number and/or name critical for source book reports |
| Quantity | Number or items purchased |
| Total Cost Per Unit | Total amount for all the items without any tax or shipping or handling |
| Unit of Issue | Based on initial "Estimated Quantity" (once entered it is not editable in the drop down) |
| Total Cost | Calculated field (Total Cost per Unit) + (Taxes+Shipping and Handling+Adjustments) |
| Payment | Method of pay (once entered it is not editable in the drop down) |
| Tracking | Method of documentation (indicates how it was received and documentation to support the purchase) |
| Check Number | Unique Number off the check |
| Delivery Location | Location where item is delivered or resides while on the incident (once entered it is not editable in the drop down) |
| Standing Order | Radio Button that will report this item in report #8 |
| Partial Pay | Radio Button that will show on a future report |
| Taxes | If taxes are paid and should not be part of the Cost per Unit |
| S and H | If shipping and handling are required and should not be part of the Cost per Unit |
| Adjustment | If there are any discounts or other fees not listed at taxes or S&H. This can be positive or negative in this field. |
| Adj. Reason | Documentation for reason of adjustment. |
| **RENTAL CAR & LAND USE AGREEMENTS** | |
| VIN/ Serial | Unique number of the piece of equipment or vehicle |
| Rental Agreement | If there is a unique rental agreement number to reference |
| License Plate | Indicate state information and unique number |
| Mileage Price | If a rental vehicle is used then the overall price per mile |
| EERA/ LUA Number | Agreement Number generated for each piece of equipment or land rental |
| First Day Under Hire | First day costs are incurred under that agreement |
| Release Date | Last day this resource is under hire |
| Total Days Under Hire | Calculated field (Release Date- First Day) |
| Comments | 255 character field |
| Attachments | Double Click to add any electronic data to this record. |

## Navigating through the Order Form:

You can use the tab button to work your way through the required fields or click on each entry.

See below for more details on how to fill-out a Standing Order, EERA, or other unique circumstances.

Once you have input your information you must   click the blue "save" button or if there is a hot link [Save Record] then use it. Additionally, to ensure the Reports are updated the user should click on the "Refresh" button on any form they are currently using.

Whenever the user has the option to close out the database or the form they are currently using, they should use any "Save and Close" radio buttons if they are available.  If none are available the user should always save before closing.

## Closing the Database:   On the Main screen (the one with the report modules) there is a "Close Database" button, this radio button will save, close, and backup the database. If the user closes the database without using this button the database will not be backed up.



The "Create Final Buying Database" button on the main form allows the user to create a final database which can be shared widely and easily without having to initiate the setup steps found in this user guide.

*NOTE: You can save the database under a different name and it will function for data input but will lose some capability like backing the database up.*

## Reports/ Backup Folders

  The main page has a list of reports which are named as described.  Example; "Equipment Dispatch Fill" will prompt the user to identify which Incident  that will return all records related to equipment assigned to that incident.  The reports can be e-mailed or exported using the radio buttons to the right of each category.

  When e-mailing the report, the system is set to use Microsoft Outlook, other e-mail systems will not be able to use the e-mail function in the reports.  When exporting the report the user will click on the report to export and it will be created and stored in the "Reports" folder which is in the Buying Team Folder located on the "C" drive.  Every time the

report button is used it will overwrite the current report that is in the folder. Therefore, the user should rename the reports generated in this folder to avoid overwriting if they choose.

The "Cost Daily Report" has parameters associated with the data which it will generate. The User will be prompted to enter the incident name (block in Form 3 which is a user fill in) and identify the date range for tracking purchases. This report date range shall be based on the "Posted Date". If this field is not filled in no records will return.

The Backup Folder will house the database every time the database is closed by the user and will date stamp the version that is created. If the main database is corrupt the user will have to delete the "IPD_v1.accbd" database and then rename the previous version with the "IPD_v1.accbd" name and save it in the main "Buying Team" folder.

## Summary
If there are any questions or issues please call 541-278-3844 or e-mail gmsmith@fs.fed.us

## Appendix A Resource List

| Resource List |
|---|
| **Field1** |
| Computer/ Cell Phone |
| Equipment-Fire Tactical |
| Equipment-Logistical |
| Food-Meals |
| Food-Supplemental |
| Fuel/ Fuel Service |
| Hydration-Ice/Water/Sport Drink |
| Land Use-Airport |
| Land Use-Bare Ground |
| Land Use-Buildings |
| Land Use-Dipsite |
| Lodging |
| Medical Supply |
| Rental Cars |
| Sanitation-Garbage/Hazmat |
| Sanitation-Restroom/Hand wash |
| Saw Parts |
| Service-Professional |
| Supply-General |
| Supply-Office |
| Telecom/ Internet |

# Appendix B Input References List

*SUPPLY SPREADSHEET INPUT DIRECTIONS*

*Enter resource orders as they are received, do not wait for fill information.  Enter the item, quantity, and member responsible for the order.*

*PARTIAL FILLS*

- *If the "EST_Quantity" requested by Dispatch is more than the "Quantity" under the vendor information it will show on the #4 Outstanding Order" Report as un filled.*

- *When posting fill information for partial fills, change the quantity and in the comments column put partial fill, i.e. "20 of total quantity of 40 filled".*

- *When posting as totally filled under the same "S" number the user needs to make sure the "EST_Quantity" is later changed to match the "Quantity" on the vendor side so it will drop off the "Outstanding Order Report".*

*STANDING ORDERS*

- *For standing orders, as you post the fill information on a certain day, create a new line item with the same quantity and the same S# without posted date and total cost.  This will leave you a line at the bottom of your spreadsheet to use for the next day's fill information.*

- *Put the date the standing order was received in the comments column.  This will be helpful if posting more than one delivery of a standing order using the same posted date.*

- *Additionally please input the "First Day Under Hire" and toggle the "Standing Order" Box on the form this will show on the "#8 Standing Order" Report*

*POSTING CREDITS*

- *If you receive a credit or a return an item, indicate the change under the "Adjustment Section" on the #3 Order Form. Change the "Posted Date" so it will show in the Cost Report current date as the posted date and show the amount as a credit.  Put a remark in the comments column explaining the credit.*

*CORRECTING MISTAKES*

- *If you have an incorrect posting, update the current S# using the current date as the posted date and show either a credit or a charge depending on what you are changing from the original posting.  Put a remark in the comments column, i.e., incorrect posting on 5/18/16.*